U. S. DEPARTMEMT OF ENERGY

Project Management Career Development Program

Certification and Equivalency Guidelines



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Purpose

These Certification and Equivalency Guidelines (CEG) establish the Department-wide competency requirements for those personnel required to be certified as Project Managers in accordance with the DOE Order 361.1 covering Acquisition Career Development. Additional qualification requirements may be required for personnel at defense nuclear facilities required who participate in the Technical Qualification Program (TQP).

These Project Management CEG establish common competency requirements for all project management personnel. Satisfactory and documented completion of the competency requirements contained in this CEG document ensures that project management personnel possess the minimum requisite competence to fulfill related duties and responsibilities. These CEG are intended to provide project management Subject Matter Experts (SMEs) with the required guidelines for evaluating equivalencies in administering the Project Management Career Development Program (PMCDP).

Applicability

These CEG apply to all Department of Energy project management personnel required to plan and execute projects in accordance with DOE Order 413.3. This document may be used as a stand-alone document or may be used in a complimentary manner with other qualification standards as determined by Office/Facility Specific requirements.

These CEG cover the competency requirements necessary to satisfy four skill levels in project management (based partially on Total Project Cost [TPC]) as follows:

- Level One Project Managers for projects with TPC greater than \$5 million, but less than \$20M.
- Level Two Project Managers for projects with TPC greater than \$20 million, but less than \$100M.
- Level Three Project Managers for projects with TPC greater than \$100 million, but less than \$400M.
- Level Four Project Managers for projects with TPC greater than \$400 million.

Considerations other than TPC may cause project manager certification requirements to be increased to higher levels. Among these are technical complexity, management complexity, stakeholder interest, and others.

Implementation Requirements

The competencies contained in this CEG document are divided into the following eleven knowledge/skill categories for each of the four Levels of certification:

General Project Management

Leadership/Team Building

Scope Management

Communication Management

Quality/Safety Management

Cost Management

Time Management

Risk Management

Contract Management

Integration Management

Behavior Factors

One or more competency statements indicated in bold print define the knowledge/skill in each category that an individual must possess, and are requirements.

The competency statements identify a familiarity level, working level, or expert level of knowledge; or, they require the individual to demonstrate the ability to perform a task or activity. These levels are defined as follows:

Familiarity level is defined as basic knowledge of or exposure to the subject or process adequate to discuss the subject or process with individuals of greater knowledge.

Working level is defined as the knowledge required to monitor and assess operations/activities, to apply standards of acceptable performance, and to

reference appropriate materials and/or expert advice as required to ensure the safety of project activities.

Expert level is defined as a comprehensive, intensive knowledge of the subject or process sufficient to provide advice in the absence of procedural guidance.

Demonstrate the ability is defined as the actual performance of a task or activity in accordance with policy, procedures, guidelines, and/or accepted industry or Department practices.

The OECM has established a program to ensure that all applicable personnel meet the competency requirements contained in this CEG. Documentation of the completion of these competency requirements must be recorded in the Corporate Human Resources Information System (CHRIS) and included in the employee's record of qualifications.

In select cases, it may be necessary to grant equivalencies for individual competencies based upon an objective evaluation of the employee's prior experience. Documentation of such equivalencies must indicate how the competency requirements have been met. These guidelines are intended to be used to allow SMEs to objectively evaluate the requests for equivalency. The supporting knowledge and/or skill statements may be considered when evaluating an individual's ability with respect to each competency requirement.

Duties and Responsibilities

The following are duties and responsibilities expected of personnel assigned to be DOE Federal project managers:

Manages all activities of assigned projects from the assignment of a project through its completion.

Reviews, evaluates, approves, and monitors, cost. schedule and scope baselines.

Monitors and oversees the progress of detailed engineering, design construction work.

Ensures the preparation of required project documentation.

Participates in the project acquisition strategy as required.

Leads the Integrated Project Team (IPT).

Ensures the preparation of reports to reflect project status, cost, and schedule trends, manpower adequacy, funding, and project uncertainties.

Conducts field inspection of work in progress and evaluates the performance of contractors using established baselines.

Ensures that the Environment, Safety and Health (ES&H) requirements and Quality Assurance requirements are properly implemented.

Develops, reviews, and endorses the annual budget requests of the projects.

Oversees the planning and coordination of the turnover of completed projects.

Additional duties and responsibilities specific to the site, the facility, the operational activities, and/or the involved organizations may be applicable.

Summary of Requirements

The required education and experience for project management personnel is:

1. Education:

Bachelor's Degree (4 years) with 24 semester hours (minimum) in science and math courses.

2. Experience:

Industrial, military, Federal, state or other directly related background that has provided specialized experience in project management. Specialized experience requirements comprise the following:

Project Manager Level One 3 years of general project management

experience.

Project Manager Level Two 2 years experience at Level One.

Project Manager Level Three 2 years experience at Level Two.

Project Manager Level Four 2 years experience at Level Three.

3. Training:

A total of 28 training courses are required to progress to Level Four. These courses are described in the PMCDP Guide.

4. Developmental Assignments:

Specific developmental assignments or experiences are required for the PMCDP. They are the following:

Twelve months of experience as a Project Engineer or as a member of an IPT.

Twelve months of experience as a supervisor or as a team leader.

Twelve months of experience with an Architect/Engineering firm, a Management and Operating (M&O) contractor, or a Management and Integration (M&I) contractor.

One year of experience as a Contracting Officer's Representative (COR).

Six months of mentoring by a Level 4 Project Manager.

Twelve months of Program Management experience at DOE Headquarters.

5. Interview:

A successful interview conducted by the Certification Review Board (CRB) is required for certification at Levels Three and Four. These procedures are outlined in the PMCDP Guide.

Detailed Knowledge and Skill Requirements

The following knowledges and skills are required to be a successful DOE Federal Project Manager. They may be acquired by training, experience, developmental assignments, or a combination. These requirements are provided for each of the four Levels of certification and are categorized by each of the eleven knowledge/skill areas. Generally, topics are provided, and the candidate must show both a knowledge of the topic, and the skill and experience of applying that knowledge in a project management environment. In some cases, the candidate can merely demonstrate that they have the capability to apply that knowledge as demonstrated in the classroom environment, but not have actual job experience in the particular knowledge area. Such occurrences should be the exception and not the rule.

These knowledge and skill requirements contain both technical knowledges and skills and behavioral skills. Definitions for each of these behavioral skills are provided in Attachment 1. Behavioral skills are often called "soft skills." A large body of research has shown that an individual's competence in behavioral skills is a better predictor than their competence in technical areas. This set of behavioral skills was developed by a team of project management experts specifically for DOE project management positions.

1. Project Management Level One:

1.1 PROJECT MANAGEMENT LEVEL 1 TECHNICAL KNOWLEDGES AND SKILLS

1.1.1 GENERAL PROJECT MANAGEMENT

1.1.1.1 Level One Project Managers must demonstrate a working level knowledge of the Federal project manager's roles and responsibilities.

Supporting Knowledge and/or Skills

The project manager's responsibilities relative to the M&O or M&I contractor.

The purpose and operation of the IPT.

Ethics requirements for project managers

1.1.1.2 Level One Project Managers must demonstrate a familiarity level knowledge of the National Environmental Policy Act (NEPA) and environmental regulations applicable to DOE projects.

Supporting Knowledge and/or Skills

The purpose and content of each of the following environmental documents and their impact on DOE projects:

Environmental Impact Statements Environmental Assessments Safety Analysis Categorical Exclusions Finding of No Significant Impact (FONSI)

The role of the project manager in the NEPA process.

The requirements of the following laws as they impact DOE projects:

Comprehensive Environmental response, Compensation, and Liability Act (CERCLA).

Resource Conservation and Recovery Act (RCRA).

National Environmental Policy Act (NEPA).

Clean Water Act (CWA).

Clean Air Act (CAA).

Toxic Substances Control Act (TSCA).

Occupational Safety and Health Act (OSHA).

The roles and responsibilities of the contractor for environmental safety and health protection, including Integrated Safety Management (ISM).

1.1.1.3 Level One Project Managers must demonstrate an expert level knowledge of DOE Order 413.3.

Supporting Knowledge and/or Skills

The purpose, scope, and application of DOE Order 413.3 and the DOE Project Management (PM) Manual. This includes the definition of key terms, essential elements and personnel responsibilities and authorities.

The source documents necessary to effectively manage the project.

The critical decision process including the roles, responsibilities, and authorities for critical decisions

The procedures for determining contractor compliance with the requirements of DOE Order 413.3 and the DOE PM Manual.

The role of the participants in the ESAAB process, the steps in the process, and the associated schedules.

The purpose and use of the Work Breakdown Structure (WBS).

The project manager's role in baseline development, change control and project status reporting, including Quarterly Project Reviews (QPRs).

The role of the project manager in the performance of independent reviews (Headquarters, External reviews, Internal assessments, GAO reviews, and IG reviews).

General engineering or scientific principles required to perform DOE projects.

Value engineering concepts and their application.

Basic probability and statistics.

The purpose, use, and content of the project Acquisition Plan.

The purpose, use, and content of the Project Execution Plan.

The EVMS and project reporting requirements in DOE Order 413.3.

1.1.2 Leadership/Team Building

1.1.2.1 Level One Project Managers must demonstrate a working level knowledge of leadership and team building.

Supporting Knowledge and/or Skills

Team building methods and recognizing individual and team performance.

Working toward results/goal orientation.

Team leadership and coordination of team activities.

Consensus building and conflict resolution techniques.

Developing trust and confidence among team members.

Understanding functional business areas (accounting, finance,

procurement, human resources, general counsel, etc.).

Effective leadership models and their application.

1.1.3 SCOPE MANAGEMENT

1.1.3.1 Level One Project Managers must demonstrate a working knowledge of WBS development and project scope baseline.

Supporting Knowledge and/or Skills

Project mission need determinations.

Conceptual and detailed design documentation and the review thereof.

Developing a project work breakdown structure.

Project scope baseline development techniques and their application.

Evaluating project alternatives.

Scope change management.

Configuration management.

1.1.4 COMMUNICATION MANAGEMENT

1.1.4.1 Level One Project Managers must demonstrate a working level knowledge of interpersonal communications.

Supporting Knowledge and/or Skills

Technical writing including reports, decision memoranda, and technical documents (specifications, PSARs, test plans, etc.).

Editing and reviewing documents.

Effective oral communication skills.

1.1.5 QUALITY/SAFETY MANAGEMENT

There are no specific competencies required in this category for level one project managers.

1.1.6 COST MANAGEMENT

1.1.6.1 Level One Project Managers must demonstrate a working level knowledge of life cycle cost estimating.

Supporting Knowledge and/or Skills

The techniques of life cycle cost estimating and analysis.

The principles of time value of money.

Basic cost estimating techniques, including parametric estimating, estimating by analogy, bottoms up estimating, and activity-based-costing.

The utilization of life cycle cost estimating in decision-making.

The estimating and use of contingency.

The principles and use of range estimating.

1.1.6.2 Level One Project Managers must demonstrate a working level knowledge of the Federal budget process.

Supporting Knowledge and/or Skills

The impacts of the Federal budget process on the project.

The role of the project manager in the Federal budget process.

The participants in the Federal budget process and the major phases of budgeting.

Budget documents, their development, and their use.

Congressional, OMB, and DOE-internal budget roles and processes.

Definitions of budget terminology.

1.1.7 Time Management

1.1.7.1 Level One Project managers must demonstrate a working level knowledge of project planning and resource loaded scheduling.

Supporting Knowledge and/or Skills

Developing project schedule networks, including the definition of activities, durations, and logic.

Critical paths and other scheduling terms.

Resource loading schedules.

Reporting and displaying schedule information

1.1.8 RISK MANAGEMENT

1.1.8.1 Level One Project Managers must demonstrate a familiarity level knowledge of project risk management.

Supporting Knowledge and/or Skills

Risk planning, identification and quantification.

The methods for determining appropriate cost and schedule contingencies for identified risks.

Appropriate control tools for managing risks.

Processes that are used to eliminate or mitigate risks.

1.1.9 CONTRACT MANAGEMENT

1.1.9.1 Level One Project Managers must possess a working level knowledge of performing as a Contracting Officer's Representative (COR).

Supporting Knowledge and/or Skills

The roles and responsibilities of a COR.

The process for modifying an existing contract.

Methods for communicating with the contractor and the roles and responsibilities of project participants.

Contract administration.

Techniques for evaluating change orders.

Evaluating contractor deliverables, accepting work, and evaluating contractor performance.

Procurement guidelines and regulations.

To attain certification for the competencies in this category, the project manager must successfully complete the following course or its equivalent:

Contracting Officer's Representative (COR) Course

1.1.9.2 Level One Project Managers must possess a demonstrated ability in the area of acquisition strategy development and acquisition planning.

Supporting Knowledge and/or Skills

The different types of acquisition strategies.

Writing Acquisition Plans.

Requirements generation, solicitation, and contract awards.

Contract types and their application.

Ethics and conflict of interest issues that may arise during the acquisition process.

To attain certification for the competencies in this category, the project manager must successfully complete the following course or its equivalent:

Acquisition Planning

1.1.9.3 Level One Project Managers must possess a demonstrated ability in the areas of Contract Types Bid/Evaluation/Award and PBI Contracting.

Supporting Knowledge and/or Skills

Federal Acquisition Regulations.

The contract bid process and various contracting documents, including RFPs, SOWs, and IFBs.

Analyzing contracting requirements

Performance-Based Incentive contracting and its application.

Bid and offer evaluations.

Procurement contract law

To attain certification for the competencies in this category, the project manager must successfully complete the following course or its equivalent:

Contract Types Bid/Evaluation/Award and PBI Contracting Course *

* This course is not required with PMI/PMP Certification.

1.1.10 INTEGRATION MANAGEMENT

1.1.10.1 Level One Project Managers must possess a demonstrated ability in the areas of project control and configuration management.

Supporting Knowledge and/or Skills

Techniques in change control and configuration management.

Preparing, reviewing, and approving baseline changes.

Basic decision making techniques.

Project Control techniques and their application.

1.1.10.2 Level One Project Managers must possess a demonstrated ability in the areas of EVMS and project reporting.

Supporting Knowledge and/or Skills

Earned Value Management Systems and their application.

EVMS certification requirements.

Definitions of EVMS terminology.

Project performance reporting using EVMS.

Methods for applying earned value techniques to quantify work progress.

Using earned value for forecasting estimates at completion.

To attain certification for the competencies in this category, the project manager must successfully complete the following courses:

Earned Value Management System and Project Reporting Course*

Level One Project Management Course (Modules I* & II)

1.2 PROJECT MANAGEMENT LEVEL 1 BEHAVIORIAL SKILLS REQUIREMENTS

1.2.1 Level One Project Managers must possess familiarity level competency in good people relations.

Supporting Skills/Abilities

Motivating others

1.2.2 Level One Project Managers must possess familiarity level competency in self management.

^{*} This course is not required with PMI/PMP Certification.

Supporting Skills/Abilities

Dealing with ambiguity Problem solving Ethics and values Being action oriented

1.2.3 Level One Project Managers must possess familiarity level competency in good work processes

Supporting Skills/Abilities

Drive for results Priority setting Managing and measuring

1.3 PROJECT MANAGEMENT LEVEL 1 EXPERIENCE REQUIREMENTS

To achieve certification the PM must also perform developmental assignments or show experience that demonstrates application of the required knowledges and skills. The following are the required developmental assignments for this competency category:

Work for 12 months as a project engineer or IPT member **
Three (3) years experience in project management

** This developmental activity is not required with a PE/RA License.

The following activities are provided to aid the SME in evaluating the adequacy of the candidate's experience in this area:

Conducting Design and Project Reviews.

Developing and/or approving engineering drawings.

Performing field construction inspections.

Performing contract administration functions in their role as a project manager.

Evaluating contractor deliverables.

Participating in the Federal budget formulation and execution processes.

Developing Project Data Sheets.

Defining project scope and the project WBS.

Writing and/or approving specifications.

Writing and/or approving decision memoranda and project reports.

Developing the project acquisition strategy and the Acquisition Plan.

Writing the PEP and getting it approved.

Participating in the ESAAB process.

Participating in the NEPA and other regulatory processes and writing NEPA documents.

Participating in Quarterly Project Reviews.

Participating in trade-off analyses and/or value engineering studies.

Developing and updating project schedules and cost estimates.

Developing and maintaining project Risk Management Plans.

Developing and using an EVMS and performing earned value analyses.

2. Project Management Level Two:

2.1 PROJECT MANAGEMENT LEVEL 2 TECHNICAL KNOWLEDGES AND SKILLS

NOTE: TO ATTAIN A LEVEL TWO CERTIFICATION ALL REQUIREMENTS FOR THE LEVEL ONE PROJECT MANAGER MUST HAVE BEEN PREVIOUSLY MET.

2.1.1 PROJECT MANAGEMENT GENERAL

2.1.1.1 Level Two Project Managers must demonstrate a familiarity level knowledge of systems engineering.

Supporting Knowledge and/or Skills

The use of the systems engineering model in project management. Functional allocation and functional requirements definition as used in systems engineering.

Design reviews (conceptual, preliminary, critical, system, etc.). System architecture development including trade-off analyses. Configuration management from a systems engineering perspective.

Test and Evaluation Planning.

2.1.1.2 Level Two Project Managers must demonstrate a familiarity level knowledge of value management.

Supporting Knowledge and/or Skills

Basics of value management and the steps in implementing a value management program in DOE.

The DOE policy and FAR requirements with respect to value management.

The use of value management in decision making Conducting trade-off studies and alternatives evaluation

2.1.1.3 Level Two Project Managers must possess a demonstrated ability in the area of pre-project planning.

Supporting Knowledge and/or Skills

The use of up-front project definition in developing project scope. Stakeholder alignment techniques.

The use of the Project Definition Rating Index (PDRI).

Project alternatives analyses, including cost-benefit analyses.

2.1.1.4 Level Two Project Managers must demonstrate a working level knowledge of facilitation techniques and conflict resolution.

Supporting Knowledge and/or Skills

Problem solving and conflict resolution Facilitation techniques and facilitating discussions/meetings

2.1.2 LEADERSHIP/TEAM BUILDING

2.1.2.1 Level Two Project Managers must demonstrate a working knowledge of leadership principles.

Supporting Knowledge and/or Skills

Developing and communicating clear goals and vision.

Recognizing individual and team performance

Effective leadership styles for different situations.

Leading integrated project teams

Developing and implementing operating procedures and systems.

Working with external project stakeholders.

2.1.2.2 Level Two Project Managers must possess a demonstrated ability in the area of HR supervision and motivational techniques.

Supporting Knowledge and/or Skills

Motivational techniques.

Assigning and evaluating work.

Identifying individual team members' strengths and weaknesses.

Individual performance planning and reviews.

2.1.2.3 Level Two Project Managers must possess a demonstrated ability in the area of integrated project team building.

Supporting Knowledge and/or Skills

Project staffing requirements analysis, interviewing, position management.

Consensus building

Developing trust and confidence among team members

Organizing teams.

Effectively planning and managing multiple tasks among team members

Monitoring and tracking results.

Assigning work.

To attain certification for the competencies in this category, the project manager must successfully complete the following course:

Leadership/Supervision Course

2.1.3 SCOPE MANAGEMENT

There are no specific competencies required in this category for level two project managers. (See requirements under section 2.1.1)

2.1.4 COMMUNICATION MANAGEMENT

2.1.4.1 Level Two Project Manager must possess demonstrated ability in effective briefing techniques.

Supporting Knowledge and/or Skills

Making formal presentations to senior management Communicating with diverse audiences Making persuasive communications with well founded convincing arguments

Communicating with multiple types of stakeholders

2.1.5 QUALITY/SAFETY MANAGEMENT

2.1.5.1 Level Two Project Manager must demonstrate a familiarity level knowledge of Integrated Safety Management (ISM).

Supporting Knowledge and/or Skills

DOE P 450.4 and the guide DOE G 450.4.

The requirements of Safeguard and Security policies and procedures.

Conducting ISM systems verifications

Write/ reviewing PSARs and FSARs

The requirements of DOE Orders 420.1, 425.1 and 5480.23

2.1.5.2 Level Two Project Manager must demonstrate a familiarity level knowledge of quality management.

Supporting Knowledge and/or Skills

Developing/interpreting QA and QC plans and procedures Systems and component testing and inspection processes The requirements of DOE Order 414.1A TQM principles The quality auditing process

2.1.6 COST MANAGEMENT

There are no specific required competencies in this category for Level Two Project Managers.

2.1.7 TIME MANAGEMENT

2.1.7.1 Level Two Project Managers must demonstrate a familiarity level knowledge of automated scheduling software.

Supporting Knowledge and/or Skills

The use of automated scheduling tools. Performing schedule analysis, crashing, and resource-leveling.

2.1.8 RISK MANAGEMENT

2.1.8.1 Level Two Project Managers must demonstrated experience in project risk management.

Supporting Knowledge and/or Skills

Preparing a risk management plan.

Assigning risk responsibility.

Managing contingency.

Project management and control tools to assist in managing identified risks.

Risk response plans.

Communicating risks effectively to project stakeholders.

To attain certification for the competency in this category, the project manager must successfully complete the following course:

*Project Risk Management Course

* This course is not required with PMI PMP Certification.

2.1.9 CONTRACT MANAGEMENT

There are no specific required competencies in this category for Level Two Project Managers.

2.1.10 INTEGRATION MANAGEMENT

There are no specific required competencies in this category for Level Two Project Managers.

2.1.11 ELECTIVES

The PMCDP offers five (5) electives for Level Two Project Managers. To attain certification at level two, project managers must select at least one (1) elective from the following group and complete the competency requirements for the elective selected:

2.1.11.1 Level Two Project Managers must demonstrate an expert level knowledge of cost and schedule estimating processes.

Supporting Knowledge and/or Skills

Conceptual estimating.

Developing estimates by analogy, parametric estimating, and

bottoms up estimating.

Contingency estimating and activity-based estimating

Direct and indirect project cost elements

Applying the earned value principles

Baseline development.

Trending and forecasting techniques

Modeling techniques

Cost/benefit analysis

To attain certification for competency 2.1.11.1, the project manager must successfully complete the following course:

Course on Cost and Schedule Estimation

2.1.11.2 Level Two Project Managers must demonstrate an expert level knowledge of the techniques used in scope management, baseline development and WBS development.

Supporting Knowledge and/or Skills

Baseline development techniques
WBS development/decomposition
Identifying requirements as functional or non-functional and
discretionary or non-discretionary
Prioritizing requirements
Recognizing and controlling scope changes

To attain certification for competency 2.1.11.2, the project manager must successfully complete the following course:

Scope Management/Baseline Development/WBS Development

2.1.11.3 Level Two Project Managers must demonstrate an expert level knowledge of value engineering.

Supporting Knowledge and/or Skills

Using value engineering to reduce cost

Understanding the difference between product cost and functional cost.

Cost allocation

Ability to recognize benefits of value engineering

Understanding of the concept of value sales

To attain certification for competency 2.1.11.3, the project manager must successfully complete the following course:

Value Engineering Course

2.1.11.4 Level Two Project Managers must demonstrate an expert level knowledge of ISM.

Supporting Knowledge and/or Skills

DOE P 450.4 and DOE G 450.4.

Establishing and maintaining an Occupational Safety and Health program as an element of ISM.

The health and safety responsibilities of line managers.

The core functions and guiding principles of ISM.

Implementing ISM on construction projects.

To attain certification for competency 2.1.11.4, the project manager must successfully complete the following course:

Integrated Safety Management

2.1.11.5 Level Two Project Managers must demonstrate an expert level knowledge of the Federal budget process.

Supporting Knowledge and/or Skills

The budget formulation process.

The budget execution process.

The impact of GPRA on the budget process

Implementing DOE O 135.1

Congressional and OMB roles and requirements in budget

formulation.

Responding to OMB and Congressional inquiries, Qs & As, etc.

To attain certification for competency 2.1.11.5, the project manager must successfully complete the following course:

The Federal Budget Process

To attain certification for the competencies in this category, the project manager must successfully complete the following courses or their equivalent:

Level Two Project Management Course Project Simulation Course

2.2 PROJECT MANAGEMENT LEVEL TWO BEHAVIORIAL SKILLS REQUIREMENTS

2.2.1 Level Two Project Managers must possess working level competency in good people relations.

Supporting Skills/Abilities

Motivating others.

2.2.2 Level Two Project Managers must working level competency in self management.

Supporting Skills/Abilities

Dealing with ambiguity. Ethics and values.

2.2.3 Level Two Project Managers must possess working level competency in creating purpose.

Supporting Skills/Abilities

Strategic agility.

Managing vision and purpose.

2.2.4 Level Two Project Managers must possess working level competency in good work processes.

Supporting Skills/Abilities

Political savvy.
Conflict management.
Drive for results.
Priority setting.

2.3.0 PROJECT MANAGEMENT LEVEL 2 EXPERIENCE REQUIREMENTS

To achieve certification the PM must also perform developmental assignments or show experience that demonstrates application of the required knowledges and skills. The following are the required developmental assignments for this competency category:

- 2.3.1 Work for a minimum of two years as a Level One Project Manager.
- 2.3.2 One year of experience as a Supervisor or as a Team Leader.
- 2.3.3 One year of project experience post CD-3 phase (construction) with an Architect/Engineering firm or DOE M&O/M&I contractor.

** This developmental activity is not required with a PE/RA License.

The following activities are provided to aid the SME in evaluating the adequacy of the candidate's experience in this area:

Requirement 2.3.1:

Performing as a Project Manager on a Level One or higher project.

Serving as a Deputy Project Manager on a Level Three or higher Level project.

Serving as a Functional Manager on a Level Four or higher project as a member of an IPT.

Making formal presentations to senior DOE management at the SES level.

Participating on negotiations teams for contractor award fee or contract awards for contracts over \$100 in size

Participating as a member of a Source Evaluation Board, or as a Source Selection Official for a contract over \$100 million in size.

Serving as a Supervisor of Project Managers.

Serving in a Project Management Office with responsibilities for reviewing/approving PEPs, reviewing/approving Acquisition Plans, developing project management policy, and/or performing ESAAB Secretariat functions for Level Three or higher projects.

Requirement 2.3.2:

Serving as a Supervisor or a Team Leader in a capacity in which the individual assigns and evaluates the work of professional employees.

Requirement 2.3.3:

Developing design documents such as drawings, specifications, etc.

Performing construction walk-down and inspections.

Directing field construction crews.

Planning field construction work.

Procuring materials and supplies for construction.

Performing acceptance testing and/or accepting facilities, equipment, or deliverables from suppliers or sub-contractors.

Writing Systems Engineering Management Plans or Test and Evaluation Management Plans.

3. Project Management Level Three:

NOTE: TO ATTAIN A LEVEL THREE CERTIFICATION ALL REQUIREMENTS FOR THE LEVELS ONE AND TWO PROJECT MANAGER MUST HAVE BEEN PREVIOUSLY MET.

3.1 PROJECT MANAGEMENT LEVEL 3 TECHNICAL KNOWLEDGES AND SKILLS

3.1.1 PROJECT MANAGEMENT GENERAL

3.1.1.1 Level Three Project Managers must demonstrate an expert knowledge of program management and portfolio analysis.

Supporting Knowledge and/or Skills

Understanding of HQ-Field relationships and Lead PSOs. Responding to Congressional inquiries.
Strategic planning and strategic goal establishment.
Use of GPRA and performance measures.
Information gathering and analysis for multiple projects.
The working relationship between DOE and OMB.

Resource allocation between multiple (competing) projects.

Project portfolio analysis.

To attain certification for competency 3.1.1.1, project managers must successfully complete the following course:

Program Management & Project Portfolio Analysis Course

3.1.2 LEADERSHIP/TEAM BUILDING

There are no specific required competencies in this category for Level Three Project Managers.

3.1.3 SCOPE MANAGEMENT

There are no specific required competencies in this category for Level Three Project Managers.

3.1.4 COMMUNICATION MANAGEMENT

There are no specific required competencies in this category for Level Three Project Managers.

3.1.5 QUALITY/SAFETY MANAGEMENT

There are no specific required competencies in this category for Level Three Project Managers.

3.1.5 COST MANAGEMENT

There are no specific required competencies in this category for Level Three Project Managers.

3.1.7 TIME MANAGEMENT

There are no specific required competencies in this category for Level Three Project Managers.

3.1.8 RISK MANAGEMENT

There are no specific required competencies in this category for Level Three Project Managers.

3.1.9 CONTRACT MANAGEMENT

There are no specific required competencies in this category for Level Three Project Managers.

3.1.10 INTEGRATION MANAGEMENT

There are no specific required competencies in this category for Level Three Project Managers.

3.1.11 ELECTIVES

The PMCDP offers eight (8) electives (2 groups of 4 each) for Level Three Project Managers. To attain certification at Level Three, project managers must successfully complete at least one (1) elective from each group:

3.1.11.A GROUP A

3.1.11.A.1 Level Three Project Managers must demonstrate an working level knowledge of the Operational Readiness Review process.

Supporting Knowledge and/or Skills

The steps in the ORR process.

The DOE role in the ORR process.

Contractor requirements for ORRs.

Developing a Safety Analysis Report.

How safety systems are used at DOE facilities.

Interpreting the hazards analysis results.

Selecting ORR team members.

The orientation and training requirements for ORRs.

To attain certification for competency 3.1.11.A.1, the Project Manager should successfully complete the following course:

Course on Operational Readiness Reviews

3.1.11.A.2 Level Three Project Managers must demonstrate an expert level knowledge of pre-project planning and project alignment processes.

Supporting Knowledge and/or Skills

Developing project execution plans that meet the requirements of DOE O 413.3.

Scope baseline development techniques.

WBS development/decomposition.

Determination of project mission need.

Determining stakeholder requirements.

Evaluating project alternatives.

Prioritizing project priorities.

Stakeholder alignment.

The techniques of value engineering.

To attain certification for competency 3.1.11.A.2, the Project Manager should successfully complete the following course:

Pre-project Planning/Project Alignment

3.1.11.A.3 Level Three Project Managers must demonstrate a working level knowledge of systems engineering.

Supporting Knowledge and/or Skills

The systems engineering process.

Directing the project requirements development process.

Managing the system architecture development.

Tradeoff analyses.

Life cycle cost analyses.

Systems Integration.

Writing scopes of work and functional design criteria.

Functional requirements decomposition.

To attain certification for competency 3.1.11.A.3, the Project Manager should successfully complete the following course:

Systems Engineering

3.1.11.A.4 Level Three Project Managers must demonstrate an expert level knowledge of the requirements of NEPA and DOE environmental regulations.

Supporting Knowledge and/or Skills

The purpose of NEPA

The types of NEPA analyses and actions required based on the results

The project manager's role in NEPA compliance

The requirements of RCRA, CERCLA, CAA, NPDES, CWA and OSHA.

To attain certification for competency 3.1.11.A.4, the Project Manager should successfully complete the following course:

NEPA and Environmental Regulations

GROUP B

3.1.11.B.1 Level Three Project Managers must demonstrate a working level knowledge of labor management relations.

Supporting Knowledge and/or Skills

Labor agreements.

The basic rights of employees and labor organizations.

The requirements of Executive Order 12871.

Union proposals and tactics in negotiation.

Negotiating labor agreements.

Dealing with labor unions regarding working conditions.

Preventing unfair labor practices.

Techniques and procedures of labor contract administration.

To attain certification for competency 3.1.11.B.1, the Project Manager should successfully complete the following course:

Labor Management Relations

3.1.11.B.2 Level Three Project Managers must demonstrate an expert level knowledge of performance based contracting.

Supporting Knowledge and/or Skills

Contract types and their application.

FAR requirements.

Acquisition planning.

Establishing performance goals for the contractor.

Contractor responses and behavior in a PBI contracting environment.

Establishing performance incentives.

Aligning performance incentives to DOE organizational goals.

Lessons-learned in PBI contracting.

To attain certification for competency 3.1.11.B.2, the Project Manager should successfully complete the following course:

Performance Based Contracting

3.1.11.B.3 Level Three Project Managers must demonstrate a working level knowledge of negotiation strategies and techniques.

Supporting Knowledge and/or Skills

Negotiations theory.

The steps in the negotiations process.

Negotiating strategies and tactics.

Developing a negotiations strategy or negotiations plan.

Ethics in negotiations.

The differences between competitive negotiated and sealed bid acquisitions.

Planning, awarding and administering a negotiated acquisition.

Preparing a source selection plan.

Award fees negotiations.

Negotiating performance-based contracting incentives.

To attain certification for competency 3.1.11.B.3, the Project Manager should successfully complete the following course:

Negotiating Strategies and Techniques

3.1.11.B.4 Level Three Project Managers must demonstrate a working level knowledge of facilitation techniques and conflict resolution processes.

Supporting Knowledge and/or Skills

Recognizing potential conflict situations.

Neutralizing conflict situations.

Negotiating "win-win" solutions.

Conducting negotiating sessions.

Using interpersonal strategies to resolve/minimize conflict in groups and between employees.

Facilitation techniques in resolving conflicts.

Individual responses to conflict.

Communications theory and styles.

Active listening techniques.

Mediation.

To attain certification for competency 3.1.11.B.4, the Project Manager should successfully complete the following course:

Facilitation Techniques/Conflict Resolution

3.2 PROJECT MANAGEMENT LEVEL 3 BEHAVIORIAL SKILLS REQUIREMENTS

3.2.1 Level Three Project Managers must possess expert level competency in good people relations.

Supporting Skills/Abilities

Motivating others.

Building effective teams.

3.2.2 Level Three Project Managers must possess expert level competency in managing self.

Supporting Skills/Abilities

Dealing with ambiguity.

Ethics and values.

Managerial courage.

3.2.3 Level Three Project Managers must possess expert level competency in creating purpose.

Supporting Skills/Abilities

Strategic agility.

Managing vision and purpose.

3.2.4 Level Three Project Managers must possess expert level competency in good work processes.

Supporting Skills/Abilities

Drive for results.

Command skills.

3.3 PROJECT MANAGEMENT LEVEL 3 EXPERIENCE REQUIREMENTS

To achieve certification the PM must also perform developmental assignments or show experience that demonstrates application of the required knowledges and

skills. The following are the required developmental assignments for this competency category:

- 3.3.1 Work for a minimum of two years as a Level Two Project Manager.
- 3.3.2 Be mentored by a Level Four Project Manager for six months.
- 3.3.3 Serve one year as a COR.

The following activities are provided to aid the SME in evaluating the adequacy of the candidate's experience in this area:

Requirement 3.3.1:

Performing as a Project Manager on a Level Two or higher project.

Serving as a Deputy Project Manager on a Level Four or higher Level project.

Serving as a Functional Manager on a Level Four or higher project as a member of an IPT.

Serving at the Office Director level at DOE Headquarters in a program office.

Serving as the Director of a Project Management Office.

Performing Operational Readiness Reviews.

Performing Pre-project planning and project alignment for large, complex projects.

Performing systems engineering activities and tasks.

Performing NEPA and environmental regulatory analyses.

Implementing PBI.

Serving on SEBs, as an SSO, or on formal negotiations teams for very large contracts (over \$400 million).

Negotiating collecting bargaining agreements and labor contracts.

Serving as a member of the SES in a project management or project management oversight capacity.

Requirement 3.3.2:

Be formally mentored by a Level 4 project manager.

Be formally mentored for one year by a member of the Senior Executive Service (SES).

Serve as a member of the SES for two years (minimum).

Requirement 3.3.3:

Serve as a COR.

Serve for two years (minimum) as a formally-designated Technical Monitor.

3.4 PROJECT MANAGEMENT LEVEL 3 INTERVIEW REQUIREMENT

All candidates for Level 3 certification must successfully complete a formal interview by the PMCDP Certification Review Board (CRB). The procedures for these interviews are contained in DOE Order 361.1, Attachment 4, and in the PMCDP Guide. DOE and external project management organizations have found that a project manager's success cannot be predicted solely on their possessing the required technical skills and abilities. These interviews are conducted to determine whether or not the candidate possesses the required behavioral skills to perform at Levels 3 and 4. These behavioral skills are those contained in this CEG.

4. Project Management Level Four:

NOTE: TO ATTAIN A LEVEL FOUR CERTIFICATION ALL REQUIREMENTS FOR THE LEVEL ONE, TWO, AND THREE PROJECT MANAGER MUST HAVE BEEN PREVIOUSLY MET.

4.1 PROJECT MANAGEMENT LEVEL 4 TECHNICAL KNOWLEDGES AND SKILLS.

4.1.1 PROJECT MANAGEMENT GENERAL

There are no specific required competencies in this category for Level Four Project Managers.

4.1.2 LEADERSHIP/TEAM BUILDING

4.1.2.1 Level Four Project Managers must demonstrate an expert level knowledge of OMB and Congressional Relations.

Supporting Knowledge and/or Skills

Congressional hearings.

Presentations to Congressional staff.

Championing projects to OMB and Congressional officials.

Congressional and GAO inquiries.

Understanding/following protocols.

Understanding the role of Congressional Affairs.

Support for budget appropriation requests.

Congressional Qs & As.

To attain certification for competency 4.1.2.1, project managers should successfully complete the following course:

Level Four Project Management Course

(Also see 4.1.4).

4.1.3 SCOPE MANAGEMENT

There are no specific required competencies in this category for Level Four Project Managers.

4.1.4 COMMUNICATION MANAGEMENT

4.1.4.1 Level Four Project Managers must demonstrate a working level knowledge of media relation techniques.

Supporting Knowledge and/or Skills

Inter-agency representation

Effective interaction with external stakeholders

Communicating with Congressional, state and local political officials

Communicating/interfacing with external stakeholder groups

Conducting telephone interviews.

Conducting ambush interviews.

Dealing with reporters.

Roles and responsibilities of the Public Affairs Office.

Public speaking techniques.

Speaking at televised events.

4.1.4.2 Level Four Project Managers must demonstrate a working level knowledge of techniques used in conducting public hearings.

Supporting Knowledge and/or Skills

Techniques for conducting public hearings.

Communicating project issues to external stakeholders.

Effective interaction with internal and external stakeholders.

Communicating lessons-learned.

Active listening techniques.

Conflict resolution techniques.

To attain certification for competencies 4.1.4.1 and 4.1.4.2, project managers should attend the following course:

Level Four Project Management Course

(Also see requirements for competency 4.1.2)

4.1.5 QUALITY/SAFETY MANAGEMENT

There are no specific required competencies in this category for Level Four Project Managers.

4.1.6 COST MANAGEMENT

There are no specific required competencies in this category for Level Four Project Managers.

4.1.7 TIME MANAGEMENT

There are no specific required competencies in this category for Level Four Project Managers.

4.1.8 RISK MANAGEMENT

There are no specific required competencies in this category for Level Four Project Managers

4.1.9 CONTRACT MANAGEMENT

There are no required competencies in this category for Level Four Project Managers

4.1.10 INTEGRATION MANAGEMENT

There are no required competencies in this category for Level Four Managers.

4.1.11 ELECTIVES

The PMCDP offers three (3) electives for Level Four Project Managers. To attain certification at level four, project managers must successfully complete at least one of the following:

4.1.11.1 Level Four Project Managers must demonstrate a working level knowledge of strategic planning processes.

Supporting Knowledge and/or Skills

The Strategic Planning process.

Establishing Organizational Mission and Vision.

Situational Analysis.

Competitive Analysis.

Environmental scanning.

Identifying Strategic Issues.

Establishing Critical Success Factors and Core Competencies.

Establishing Strategic Goals and Strategic Objectives.

Writing a Strategic Plan.

Developing quantitative performance measures.

Operationalizing the Strategic Plan

Distinguishing between mission and mandates

To attain certification for competency 4.1.11.1, project managers should successfully complete the following course:

Strategic Planning

4.1.11.2 Level Four Project Managers must demonstrate an expert level knowledge of advanced leadership practices.

Supporting Knowledge and/or Skills

Effectively planning and managing multiple tasks.

Leading a large multi-disciplined technical organization.

Collaborative problem-solving and decision-making techniques.

Developing trust and confidence among team members.

Effectively applying methods to track team performance.

Managing multi-program resources.

Leadership theories, styles, models, and techniques.

Situational leadership.

Transactional leadership.

Communicating organizational vision.

Strategic thinking.

Learning from historical leaders.

Identifying individuals' strengths and weaknesses.

Building effective teams.

Communications theory.

To attain certification for competency 4.1.11.2, project managers should successfully complete the following course:

Advanced Leadership

4.1.11.3 Level Four Project Managers must demonstrate an expert level knowledge of practices in advanced risk management.

Supporting Knowledge and/or Skills

Identifying critical issues and risks.

Conducting root cause analysiss.

Applying risk categorization principles.

Advanced techniques for project risk identification, quantification, and analysis.

Using modeling tools and techniques in managing risk.

Using simulations in risk analysis.

Developing risk management plans for large projects.

Applying lessons-learned from accident/incident investigations.

To attain certification for competency 4.1.11.3, project managers should successfully complete the following course:

Advanced Risk Management

4.2 PROJECT MANAGEMENT LEVEL FOUR BEHAVIORIAL SKILLS REQUIREMENTS.

4.2.1 Level Four Project Managers must possess demonstrated ability in good people relations.

Supporting Knowledge/Skills/Abilities

Building effective teams

4.2.2 Level Four Project Managers must possess demonstrated ability in self-management.

Supporting Knowledge/Skills/Abilities

Dealing with ambiguity Ethics and values Managerial courage

4.2.3 Level Four Project Managers must possess demonstrated ability in creating purpose.

Supporting Knowledge/Skills/Abilities

Strategic agility
Managing vision and purpose

4.2.4 Level Four Project Managers must possess demonstrated ability in work processes.

Supporting Knowledge/Skills/Abilities

Command skills

4.3 PROJECT MANAGEMENT LEVEL 4 EXPERIENCE REQUIREMENTS

To achieve certification the PM must also perform developmental assignments or show experience that demonstrates application of the required knowledges and

skills. The following are the required developmental assignments for this competency category:

- 4.3.1 Work for a minimum of two years as a Level Three Project Manager.
- 4.3.2 Perform Program Management duties at DOE Headquarters for one year (minimum).

The following activities are provided to aid the SME in evaluating the adequacy of the candidate's experience in this area:

Requirement 4.3.1:

Performing as a Project Manager on a Level Three or higher project.

Performing at the DOE Associate Deputy Assistant Secretary level or higher.

Performing at the DOE Operations Office Assistant Manager level or higher. Performing as the DOE Field Office Manager.

Leading large project teams or large organizations.

Interfacing with Congressional officials or Congressional staff.

Interfacing with officials from OMB or other Federal agencies.

Interfacing with public officials and state and local government officials.

Interfacing with the media.

Conducting public hearings.

Performing strategic planning and writing strategic plans.

Performing advanced risk management for large, complex projects.

Requirement 4.3.2:

Performing Program Management duties at DOE Headquarters.

Performing Program Management duties at another Federal Agency's Washington, DC Headquarters.

Establishing Program performance measures.

Making mission need determinations.

Aligning project objects with program strategic goals and objectives.

Performing program planning.

Project management oversight.

Performing oversight of field activities.

Interfacing with Congressional staff.

Congressional inquiries, including GAO.

Performing project reviews.

Program level budget formulation and defense.

Auditing and investigative work.

Performing technology development work in support of project needs.

Awarding grants and large contracts.

5. EVALUATION REQUIREMENTS

The appropriate qualifying official may use the evaluation process identified below as a measuring tool for assessing whether the project management candidate has acquired the competencies outlined in this CEG.

Documented successful completion of the competencies, training requirements, and developmental assignments may be satisfied using any of the following methods:

- Training courses
- Developmental assignments
- On-the-job experience
- Written examination
- Documented oral examination
- Documented observance of performance

The achievement of the individual competencies will be approved by cognizant field personnel, including supervisors, SMEs, or training administrators, using formal procedures. This process shall be formalized, documented, and auditable. A formal training folder documenting the achievement of individual competencies shall be maintained in the field for each individual in the PMCDP.

The Office of Engineering and Construction Management will grant the final certification for each Level.

5. CONTINUING EDUCATION REQUIREMENTS

Once certified, project managers are required to earn a minimum of 60 Continuing Education Units (CEUs) every two years. The requirements for this portion of the PMCDP are outlined in DOE Order 361.1 Attachment 4 and in the DOE PMCDP Guide.

ATTACHMENT 1

Behavioral Competency Definitions

The numbers to the left of the competency title are those assigned by Lominger Limited, Inc. They are in alphabetical order by category: Managing Self; People Relations; Work Process and Creating Purpose.) All competencies and definitions are the property of Lominger Ltd., Inc.

A. MANAGING SELF

- 1 **ACTION ORIENTED:** Enjoys working hard; is action oriented and full of energy for the things he/she sees as challenging; not fearful of acting with a minimum of planning; seizes more opportunities than others.
- DEALING WITH AMBIGUITY: Can effectively cope with change; can shift gears comfortably; can decide and act without having the total picture; isn't upset when things are up in the air; doesn't have to finish things before moving on; can comfortably handle risk and uncertainty.
- 22 **ETHIC AND VALUES:** Adheres to an appropriate (for the setting) and effective set of core values and beliefs during both good and bad times; acts in line with those values; rewards the right values and disapproves of others; practices what he/she preaches.

- 32 **LEARNING ON THE FLY:** Learns quickly when facing new problems; a relentless and versatile learner; open to change; analyzes both successes and failures for clues to improvement; experiments and will try anything to find solutions; enjoys the challenge of unfamiliar tasks; quickly grasps the essence and the underlying structure of anything.
- 51 **PROBLEM SOLVING:** Uses rigorous logic and methods to solve difficult problems with effective solutions; probes all fruitful sources for answers; can see hidden problems; is excellent at honest analysis; looks beyond the obvious and doesn't stop at the first answers.
- 34 34 MANAGERIAL COURAGE: Doesn't hold back anything that needs to be said; provides current, direct, complete, and "actionable" positive and corrective feedback to others; let's people know where they stand; faces up to people problems on any person or situation (not including direct reports) quickly and directly; is not afraid to take negative action when necessary.

B. PEOPLE RELATIONS

36 **MOTIVATING OTHERS:** Creates a climate in which people want to do their best; can motivate many kinds of direct reports and team project members; can assess each person's hot button and use it to get the best out of him/her; pushes tasks and decisions down; empowers others; invites input from each person and shares ownership and visibility; makes each individual feel his/her work is important; is someone people like working for and with.

- 42 **PEER RELATIONSHIPS:** Can quickly find common ground and solve problems for the good of all; can represent his/her own interests and yet be fair to other groups; can solve problems with peers with a minimum of noise; is seen as a team player and is cooperative; easily gains trust and support of peers; encourages collaboration; can be candid with peers.
- 60 **BUILDING EFFECTIVE TEAMS:** Blends people into teams when needed; creates strong morale and spirit in his/her team; shares wins and successes; fosters open dialogue; lets people finish and be responsible for their work; defines successes in terms of the whole team; creates a feeling of belonging in the team.

C. CREATING PURPOSE

- 65 MANAGING VISION AND PURPOSE: Communicates a compelling and inspired vision or sense of core purpose; talks beyond today talks about possibilities; is optimistic, creates mileposts and symbols to rally support behind the vision; makes the vision sharable by everyone; can inspire and motivate entire units or organizations.
- 58 **STRATEGIC AGILITY:** Sees ahead clearly; can anticipate future consequences and trends accurately; has broad knowledge and perspective; is future oriented; can articulately paint credible pictures and visions of possibilities and likelihood; can create competitive and breakthrough strategies and plans.

D. WORK PROCESSES

9 **COMMAND SKILLS:** Relishes leading; takes unpopular stands if necessary; encourages direct and tough debate but isn't afraid to end it and move on; is looked to for direction in a crisis; faces adversity head on; energized by tough challenges.

- 12 **CONFLICT MANAGEMENT:** Steps up to conflicts, seeing them as opportunities; reads situations quickly; good at focused listening; can hammer out tough agreements and settle disputes equitably; can find common ground and get cooperation with minimum noise.
- 27 **INFORMING:** Provides the information people need to know to do their jobs and to feel good about being a member of the team, unit, and/or the organization; provides individuals information so that they can make accurate decisions; is timely with information.
- MANAGING AND MEASURING WORK: Clearly assigns responsibility for tasks and decisions; sets clear objectives and measures; monitors process, progress₁ and results; designs feedback loops into work.
- ORGANIZATIONAL AGILITY: Knowledgeable about how organizations work; knows how to get things done both through formal channels and the informal network; understands the origin and reasoning behind key policies, practices, and procedures; understands the cultures of organizations.
- 47 **PLANNING:** Accurately scopes out length and difficulty of tasks and projects; sets objectives and goals; breaks down work into the process steps; develops schedules and task/people assignments; anticipates and adjusts for problems and roadblocks; measures performance against goals; evaluates results.
- **48 POLITICAL SAVVY:** Can maneuver through complex political situations effectively and quietly; is sensitive to how people and organizations function; anticipates where the land mines are and plans his/her approach accordingly; views corporate politics

as a necessary part of organizational life and works to adjust to that reality; is a mazebright person.

- 50 **PRIORITY SETTING:** Spends his/her time and the time of others on what's important; quickly zeros in on the critical few and puts the trivial many aside; can quickly sense what will help or hinder accomplishing a goal; eliminates roadblocks; creates focus.
- 53 **DRIVE FOR RESULTS:** Can be counted on to exceed goals successfully; is constantly and consistently one of the top performers; very bottom-line oriented; steadfastly pushes self and others for results.